



Tax Preparation Sheet

Step 1: General Information

Name: _____
 Current Street Address or P.O. Box Number: _____
 City, State and Zip Code: _____
 Contact Phone Number _____
 Social Security Number (Last 4 digits only) XXX-XX-_____ Date of Birth _____

Filing Status: (circle one)
 Single Married Filing Separate Joint

Spouse Name: _____
 Spouse SSN: XXX-XX-_____

Complete if you have moved since January 1, 2026
 Previous Street Address or P.O. Box Number _____
 City, State and Zip Code: _____
 Move out date of previous address: _____

Check any of the boxes if the situation applies to you:
 You are retired. Provide retirement date. _____
 Your Spouse is retired. Provide Spouse retirement date. _____
 You have no Municipal Taxable Income for the entire year.

Step 2: Documentation (Documents will not be returned)

Include copies of the following documents, in an envelope, if applicable to your situation:
 W-2s (include the copies showing city taxes withheld. SD2305 is School District NOT city withholdings.)
 W-2Gs Gambling Winnings
 Schedule C – Profit or Loss from Business Schedule E- Supplemental Income and Loss
 Other Income (1099-NEC/MISC, Schedule F-Profit or Loss from Farming, 4797 – Sales of Business Property)
 **Include first two pages of Federal Form 1040 and Schedule 1.

Signature _____ Date _____

Signature _____ Date _____

Please sign this form to streamline the filing process
 Upload this form to the Form Center with your tax documentation. Select **Income Tax** from
 the department drop down menu.